

Probate cases on this calendar are currently under review by the probate examiners. Review of some probate cases may not be completed and therefore have not been posted.

If your probate case has not been posted please check back again later.

Thank you for your patience.

Roberts, Gregory J. (Joyce A. Henry – trustee/Petitioner)

Trustee's Third Accounting of Trust Assets and Petition for Its Approval; for Waiver of Future Accountings and for Allowance of Attorney's Fees and Costs

			JOYCE A. HENRY, Trustee, is petitioner.	NEEDS/PROBLEMS/COMMENTS:
			Account period: 05/01/12 - 04/30/14	Note: If further good untings are
Со	nt. from 100614 Aff.Sub.Wit.		Accounting - \$419,215.90 Beginning POH - \$327,870.67 Ending POH - \$228,866.56	Note: If further accountings are not dispensed with, a status hearing will be set as follows: Monday, 07/11/16 at 9:00 a.m. in Department 303 for
✓	Verified		Trustee - not addressed	the filing of the fourth
	Inventory		Attorney - \$3,927.00 (Per	account.
	PTC		declaration and itemization, 4.55 attorney	Pursuant to Local Rule 7.5 if the required accounting is filed 10
	Not.Cred.		hours @ \$280/hr. and 17.6 paralegal hours @	days prior to the hearing on the
·/	Notice of Hrg	/	\$140/hr.)	matter the status hearing will come off calendar and no
Ě	Aff.Mail Aff.Pub.	w/	Attorney costs - \$435.00 (certified	appearance will be required.
	Sp.Ntc.		copy and filing fees)	
	Pers.Serv.		Petitioner states that settlement payments	
	Conf. Screen		from AIGA are all deposited electronically into the blocked account. The Court has	
	Letters		authorized these payments to be distributed	
	Duties/Supp		to Petitioner to pay for beneficiary's	
	Objections		expenses, including care-giving services provided by Petitioner. The authorized	
	Video		payments are electronically transferred from	
	Receipt		the blocked account to a checking account established by Petitioner in the name of the	
⊨	CI Report 9202		Trust. The court has not required Petitioner to	
√	Order		account for the expenses paid on behalf of	
	Aff. Posting		beneficiary with these funds, but has required Petitioner to file a bond in the amount of	Reviewed by: JF
	Status Rpt		\$46,500.00. Petitioner, who is beneficiary's	Reviewed on: 10/28/14 Updates:
	UCCJEA		mother, has cared for beneficiary exclusively since the accident which occurred while	
	Citation		beneficiary was a minor and left her	Recommendation:
	FTB Notice		permanently severely disabled. The Court has required Petitioner to provide a biennial accounting for the blocked account. This is the third accounting of those funds. No withdrawals above the monthly settlement payments are permitted without a court order. Petitioner therefore requests that future accountings of the blocked account be waived until such time as the Trust attorney's fees and costs necessitated by the accountings but will not in any way be detrimental to the Trust or the Trust beneficiary, because there will be no change in the requirement of court approval for all disbursements from the account. Continued on Page 2	File 1 – Tyler

Page 2

Petitioner states that on 05/03/12 the Court approved Petitioner's petition for the expenditure of \$53,652.00 for a new van to transport the Trust beneficiary. Petitioner delivered a cashier's check to David John of Driving Specialties, Ltd. on 05/14/12. Petitioner had been dealing with David John and this company for many years. Petitioner had no reason to believe that the van would not be delivered as promised. However, on 07/20/12, Petitioner had a conversation with David John and received an e-mail from him on 07/26/12 indicating that the van would not be delivered. Petitioner learned that there were 10 other individuals whose funds had been taken by David John in a similar manner. On 09/04/12, Petitioner submitted a claim to International Fidelity Insurance Company ("IFIC") the surety that issued the bond of David John on behalf of Driving Specialties, Ltd. Petitioner also filed an Investigative Complaint with the DMV. Petitioner also received correspondence from attorney Charles Sosa of the law firm representing IFIC indicating that the claims exceeded the amount of the bond and that IFIC would file an interpleader complaint if no agreement could be reached among all parties as to how the proceeds of the bond would be divided. Ultimately, the Interpleader Complaint was filed in Solano County. Petitioner, unsophisticated in litigation and most other legal matters, did not understand the meaning of being named a defendant in the action and did not believe she had to do anything further related to the litigation. Petitioner did not attempt to contact her attorney, Barrus and Roberts, P.C., nor any other attorney, regarding the theft of Trust funds by David John. Petitioner, Joyce Henry, had a default entered against her on 11/19/12. When attorney Roberts began preparing this Third Account, Petitioner relayed the details of this matter and provided him with all of the correspondence she had received, as well as her notes. In the meantime, in March 2013, David John applied the sum of \$3,000.00 as a down payment to facilitate Petitioner's purchase of a used 2011 Ford E350 van on 03/15/13. David John also indicated that he would make the payments on the van as they came due. Ultimately, in addition to the \$3,000.00 down payment, he has paid Petitioner an additional \$1,000.00 on 08/12/13 and \$500.00 each on 9/10/13 and 05/22/14 for a total of \$5,000.00. The monthly payments for the replacement van of \$521.52 began on 04/29/13. Petitioner also received a refund from the DMV in the amount of \$113.00. The contract for the replacement van was for a 6 year payout, with a total sum of \$37,549.44 ultimately due for the vehicle. Petitioner has been making the monthly payments on the replacement van from her own personal funds. On the accounting, since the money paid for the van authorized by the court was gone and no part of it was applied against the purchase of the replacement van, the book value shown is \$0.00. The current blue book value market value of the replacement van is estimated to be \$17,946.00. Petitioner apologizes to the court for her failure to contact her attorney, but truly believed that the actions filed in this matter would protect the Trust's interests to the fullest extent possible.

Bond is currently posted in the amount of \$46,500.00.

Petitioner prays for an order:

- 1. Settling and allowing the account and report and approving and confirming the acts of Petitioner and the Trust from 05/01/12 through 4/30/2014;
- 2. Authorizing and directing the Trustee to pay to Gregory J. Roberts the sum of \$3.927.00 for legal services and the sum of \$435.00 for costs advanced; and
- 3. Waiving future accountings of the blocked account until such time as the Trust terminates or the court otherwise orders.

Continued on Page 3

Charmaigne Tyler (Trust)

Case No. 0545053 Page 3

Attorney's Statement Regarding Repayment of Funds to Trust filed 10/22/14 includes a calculation and plan of restitution of funds misappropriated by David John, a Promissory Note, and a Deed of Trust with Assignment of Rents. The plan indicates that Trustee, Joyce Henry will continue making payments on the new van with her own funds (payments total \$37,549.44). According to the plan of restitution, there will be a balance remaining of \$10,989.56 after all payments on the new van are complete, but it is anticipated that the fair market value of the van will exceed that amount when the payments are complete. The promissory note is to be non-interest bearing, as the amounts still due to be paid on the new van include interest.

2 Harold P. Hanson (Estate)

Case No. 0596442

Atty Markeson, Thomas A. (for Petitioner/Executor Frank Volpa)

Atty Berger, Bruce J. (for Sigma Chi Building Foundation)

Atty Hall, Christopher (for Sigma Chi Foundation)

Petition for Instructions for Further Hearing

DOD: 7/27/1997	FRANK VOLPA, Executor, is petitioner.	NEEDS/PROBLEMS/COMMENTS:
Cont. from Aff.Sub.Wit. Verified Inventory PTC Not.Cred. Notice of Hrg Aff.Mail W/ Aff.Pub. Sp.Ntc. Pers.Serv. Conf. Screen	Petitioner states on 5/28/14 he filed a Petition for Instructions regarding a "Gift Agreement" he executed in January 2008. All interested parties submitted documents on their positions in the matter and the matter was heard on 7/14/14. The court ordered those interested parties to submit an order. Petitioner is informed that the parties have been unable to agree regarding the terms of the order. Order dated 9/19/14 reset the Petition for Instructions regarding the "Gift Agreement." In the Petition for Instructions Petitioner stated on October 9, 2007 he obtained an Order for Final Distribution. On December 4, 2007, the court modified the order nunc pro tunc to correct the serial number on two savings	NEEDS/PROBLEMS/COMMENTS: 1. Sigma Chi Foundation owes a filing fee of \$435.00 for the filing of their response. Note: The pleadings say that all interested parties submitted documents, however no documents were filed by Sigma Chi Foundation. It appears Sigma Chi appeared at the hearing but they have never paid a filing fee in this matter.
Pers.Serv. Conf. Screen Letters Duties/Supp Objections Video Receipt CI Report 9202 Order Aff. Posting Status Rpt UCCJEA Citation	Final Distribution. On December 4, 2007, the court modified the order nunc pro tunc to correct the serial number on two savings bonds. In pertinent part the disposition section of the 2007 order reads as follows: "To Sigma Chi Foundation, for scholarships for the Beta Delta Chapter of Sigma Chi" In January 2008 Sigma Chi officials presented a "Gift Agreement" to the executor regarding the funds. Based on the letter (attached as Exhibit A) and directed by Raymond Love, Petitioner executed the agreement on behalf of the estate (copy of the agreement attached as Exhibit B). Petition is informed that	Reviewed by: KT Reviewed on: 10/29/14 Updates: Recommendation:
FTB Notice	since that time, and pursuant to the Gift Agreement, the funds delivered to Sigma Chi have been used only for members of the Beta Delta Chapter and have been used to fund academic scholarships to attend the University of Montana, and scholarships for Sigma Chi Foundation leadership training programs. Please see addition page	File 2 – Hanson

Petitioner is informed that a dispute exists between the Sigma Chi Foundation and the Sigma Chi Building Foundation (reportedly a Montana non-profit corporation which was authorized by resolution dated 4/14/14, of the Beta Delta Chapter of Sigma Chi Fraternity). The Sigma Chi Foundation alleges that the funds should only be used for academic scholarships to attend the University of Montana and not for leadership training or any other use.

Petitioner states he has no independent knowledge of whether the decedent intended that the funds be used only for the purposes of funding scholarships to the University of Montana, or whether the decedent's intent would allow for scholarships to attend Sigma Chi developed leadership and other such programs as well. The attorney who drafted the will, Ruth Ratzlaff, received the document attached as Exhibit C from Harold Hanson prior to her preparation of the will. The handwritten portion in the middle of the page appears to provide a bequest to the Sigma Chi Foundation for "an annual scholarship at Beta Delta Chapter in Missoula to be chosen by the Board of Governors." In addition, at the bottom of the page, Harold Hanson typed and wrote the following: "an annual Scholarship Fund, BETA DELTA CHAPTER OF SIGMA CHI, Missoula Mt to be chosen by the Board of Governors of Sigma Chi at 1714 Hinman ave. Evanston, ILL 60201."

Petitioner prays that the court either approve and confirm the execution of the Gift Agreement dated, January 23, 2008, or alternatively, that the court enter such other orders/instructions as the court deems appropriate.

Sigma Chi Building Foundation's Points and Authorities in Response to Executor's Petition for Instructions filed on 7/10/14. Sigma Chi Building Foundation concludes the use by Sigma Chi Foundation of the Hanson bequest for "educational programs" and "leadership training" goes against the intent of Mr. Hanson in establishing "a scholarship fund" for Beta Delta. Under the circumstances Sigma Chi Building Foundation respectfully requests the court order Sigma Chi Foundation to: (1) restrict the use of the Hanson bequest to scholarships to active members of Beta Delta to attend University of Montana, and to cease using the Hanson bequest for Sigma Chi Foundation-sponsored educational or leadership programs; (2) provide an accounting for all funds or other assets received as part of the Hanson bequest; and, (3) alternatively, respond to limited discovery requests propounded by SCBF in lieu of an accounting.

Declaration of James W. Thompson in Support of Sigma Chi Building Foundation's Points and Authorities filed on 7/10/14. Mr. Thompson states on 4/7/14, the active members of Beta Delta Chapter, resolved in writing to authorize Sigma Chi Building Foundation to act on Beta Delta's behalf with regard to all matters concerning the bequest from Harold P. Hanson, deceased, to the Beta Delta Chapter.

Neither Beta Delta nor Sigma Chi Building Foundation learned of Mr. Hanson's scholarship funds to Beta Delta until early 2014.

On 4/29/14 and on 5/16/14, on behalf of Sigma Chi Building Foundation, Mr. Thompson states he wrote Sigma Chi Foundation requesting the status of Mr. Hanson's gift of scholarship funds, and how those funds had been used. By letter dated 5/28/14 J. Ashley Woods, General Counsel for Sigma Chi Foundation, responded.

Mr. Thompson states he is informed and believes that Sigma Chi Foundation has yet to award any scholarships from Mr. Hanson's bequest. Mr. Thompson states he has made repeated requests to Sigma Chi Foundation to account for all funds received from Mr. Hanson's estate, all which have been declined.

Please see additional page

Dept. 303, 9:00 a.m. Monday, November 3, 2014

Sigma Chi Building Foundation's Further Points and Authorities in Response to Executor's Petition for Instructions filed on 10/20/14. Sigma Chi Building Foundation states both Sigma Chi Building Foundation and Sigma Chi Foundation submitted proposed orders, neither of which the court was inclined to sign, and, while thereafter some progress was made in negotiating a compromise order, the parties reached an impasse regarding Sigma Chi Foundation's accounting obligation.

As of 10/7/14, Sigma Chi Foundation has hired new counsel, who apparently aims to attack the heart of the court's earlier ruling by contending that Sigma Chi Building Foundation lacks standing to challenge the executor's agreement with Sigma Chi Foundation to use the Hansen bequest contrary to the wishes of the testator. Sigma Chi Foundation's contention is without merit, and by failing to challenge Sigma Chi Building Foundation's standing at the 7/14/14 hearing Sigma Chi Foundation effectively waived this issue in favor of Sigma Chi Building Foundation.

At this juncture, the issue properly before the court is the scope of the order as it relates to "transparency" and in effect, Sigma Chi Foundation's duty to account to Sigma Chi Building Foundation/Beta Delta.

The Declaration of Bruce J. Berger filed on 7/18/14 explains the differences in the proposed orders submitted after the 7/14/14 hearing. The parties were unable to negotiate a compromise order, despite their good faith efforts.

At this point, the court's guidance is needed to establish the extent to which Sigma Chi Foundation shall be held to account to its beneficiary with regard to the Hanson bequest.

Declaration of Bruce J. Berger filed on 7/18/14 states that on 7/17/14 he e-mailed J. Ashley Woods, an authorized officer of Sigma Chi Foundation a copy of an earlier version of Sigma Chi Building Foundation's proposed order. The idea was to obtain Mr. Woods' approval as to form. Later that day, Mr. Berger states he received from Mr. Woods a proposed alternative order which deleted without explanation portions of Sigma Chi Building Foundation's proposed order. Based on the deletions, it appears that Sigma Chi Foundation believes it has some wiggle room with regard to the use of the Hanson bequest for other than "scholarships," and that Sigma Chi Foundation takes issue with the provisions in Sigma Chi Building Foundation's proposed order requiring accounting by Sigma Chi Foundation to Sigma Chi Building Foundation with "transparency," and declaring null and void the March, 2008 Gift Agreement between the executor and Sigma Chi Foundation.

Mr. Berger states first he recalls, and his notes from the hearing reflect, the court's clearly stated expectation that Sigma Chi Foundation will account to Sigma Chi Building Foundation with "transparency." In order to address any ambiguity, Mr. Berger states he added some time parameters that he submits are entirely reasonable, given the fiduciary responsibility of Sigma Chi Foundation to Sigma Chi Building Foundation with regard to the Hanson bequest.

Second, Mr. Berger states he took the court's ruling to restrict the meaning of the word "scholarship" to its literal academic sense, to mean that the Hanson bequest can be used only for qualified applicants from the Beta Delta Chapter of Sigma Chi to obtain the advantages of a college education at the University of Montana and shall not be used for educational and/or leadership programs sponsored by Sigma Chi Foundation, and/or any other purpose.

Please see additional page

2 Harold P. Hanson (Estate)

Case No. 0596442

Declaration of Bruce J. Berger filed on 7/18/14 (continued):

Third, Mr. Berger states given the court's ruling restricting the meaning of the word "scholarship," the logical extension of that ruling is that the March, 2008 Gift Agreement, the entire purpose of which was to allow use of the Hanson bequest for other than "scholarships," is rendered a dead letter; i.e., the Gift Agreement is null and void.

Sigma Chi Foundation's Response to Sigma Chi Building Foundations Further Points and Authorities filed on 10/27/14 states Sigma Chi Building Foundation's Further Points and Authorities contains inaccurate statements of law and mischaracterizes the nature of the proceedings to date. Sigma Chi Building Foundation's request for an accounting misses the mark, overreaches, and is nothing mort ha an impermissible attempt to control and direct the Sigma Chi Foundation's activities, which this court should not endorse or permit. Not only are Sigma Chi Building Foundation's claims not germane to the administration of the Estate, but California Government Code section 12598 specifically prohibits Sigma Chi Building Foundation's attempt to control, direct, or otherwise monitor Sigma Chi Foundation. Sigma Chi Building Foundation lacks standing to seek any orders from this court regarding the scholarship fund in question and specifically lacks standing to obtain an accounting.

Sigma Chi Foundation asks the court to deny Sigma Chi Building Foundation's request for accountings and further asks this court to enter an order according to the Executor's proposed Order on the Petition for Instructions.

Legal arguments included in the response.

Sigma Chi Foundation requests this Court enter the Order previously submitted by counsel for the Executor Frank J. Volpa, which provides:

- The scholarship fund established under paragraph 2 of the Fourth Article of the Will of Harold P.
 Hanson shall be used only for qualified applicants from the Beta Chapter of Sigma Chi Fraternity
 to obtain advantages of a college education at the University of Montana where the Beta Delta
 Chapter is established.
- 2. In light of the foregoing, paragraph one, section 1 of the March 2008 Gift Agreement between Executor, Frank J. Volpa and the Sigma Chi Foundation shall be amended to read as follows: "Sponsorship at a rate to be determined by the Sigma Chi Foundation to provide academic scholarships to the University of Montana for members of the Beta Delta Chapter of Sigma Chi Fraternity."
- 3. The scholarship fund established under Paragraph 2 of the Fourth Article of the Will of Harold P. Hanson shall continue to be administered by Sigma Chi Foundation.

Flanigan, Philip M. (Petitioner – attorney for Carolyn Lewis/Executor)

Second Amended First and Final Accounting and Report of Status of Administration; Petition for Settlement Thereof; for Allowance of Statutory Attorney and Administrator's Compensation; for Reimbursement of Costs Advanced; and Petition to Close Estate

DOD: 08/15/04			CAROLYN LEWIS, Executor, is Petitioner.	NEEDS/PROBLEMS/		
			Accounting is waived.	COMMENTS:		
			Accounting is warrou.	CONTINUED FROM 10/06/14		
			1 & A - \$200,000.00	Minute Order from 10/06/14 states: The Court directs		
Со	nt. from 082514	1,	POH - \$44,675.17	counsel to file a declaration.		
100	0614	•	Executor - waived	The Petition requests that		
	Aff.Sub.Wit.			the full statutory fee be		
√	Verified		Attorney - \$4,000.00 (statutory)	paid to the Attorney,		
√	Inventory		Costs - \$1,213.00 (filing fees,	however, Probate Code § 12205 states that the		
✓	PTC		publication, probate referee)	Court may reduce		
-	Not.Cred.		Distribution, pursuant to decedent's will, is to:	compensation to the personal representative		
·	Notice of		Distribution, pursuant to decedent 5 will, is 10.	and/or attorney when the		
	Hrg		Carolyn Lewis- \$39,462.17	time taken to close the estate exceeds the time		
✓	Aff.Mail	w/	Declaration of Philip Flanigan in Support of	prescribed in the code,		
H	Aff.Pub.	**/	Allowance of Statutory Attorney Fees filed	etc. The decedent died in 2004 and Letters were		
			10/20/14 states: as attorney for the personal	issued on 12/08/05. The		
—	Sp.Ntc.		representative, Carolyn Lewis, he prepared the initial Petition for Probate and supporting	Court may consider reducing the requested		
 	Pers.Serv.		documents, Inventory & Appraisal and he	compensation.		
	Conf.		required notices. After obtaining appointment	·		
 	Screen	/O.F.	as Executor, Ms. Lewis sold the real property			
 	Letters 12/06/	05	asset of the estate and moved. She did not provide any forwarding information to the			
	Duties/Supp		attorney. Correspondence sent to Ms. Lewis			
	Objections		was not returned but no response was received			
	Video		either. As such, the file was thereafter ignored and only upon the Court's requiring the proper			
	Receipt		closing of the probate did his office engage in			
	CI Report		additional efforts to try and locate Ms. Lewis			
✓	9202		and file this Petition. Mr. Flanigan states that his office has done all that is required in order to			
✓	Order		complete the process and thus, he submits has			
	Aff. Posting		earned the right to statutory compensation.	Reviewed by: JF		
	Status Rpt		While the matter would not have been closed absent the Court's insistence, the fact remains	Reviewed on: 10/28/14		
	UCCJEA		that his office's efforts allowed Petitioner, who is	Updates:		
	Citation		the sole beneficiary of the estate, to be able to	Recommendation:		
🗸	FTB Notice		sell the property. Nevertheless, if the Court disagrees, he is willing to abide by the Court's	File 3 - Geise		
			determination as to reasonable compensation			
			for his services and have no objection to a			
			reduction in the compensation being			
			requested. Declarant understands that Ms. Lewis is not in good health and thus his primary			
			objective is to get this matter closed.			
			-	2		

Renge, Lawson K. (for Takako Renge – Administrator)

Probate Status Hearing Re: Failure to File the Inventory and Appraisal and for Failure to File a First Account or Petition for Final Distribution

Cont. from 030714, 062014, 081914 Aff.Sub.Wit. Verified Inventory PTC Not.Cred. Notice of Hrg Aff.Mail Aff.Pub. Sp.Ntc. Pers.Serv. Conf. Screen Letters	TAKAKO RENGE, spouse, was appointed Administrator with full IAEA without bond on 10/10/2006. Letters issued on 10/10/2006. Inventory and Appraisal was due on 03/2007. First Account or Petition for Final Distribution was due 12/2007. Notice of Status Hearing was mailed to Lawson K. Renge on 11/22/2013. Former Status Report filed 03/05/2014 states the majority of the Estate has been transferred without the need for probate order. There remains some miscellaneous property appearing in the name of decedent, Howard Renge aka Howard Kange Renge,	NEEDS/PROBLEMS/COMMENTS: Continued from 08/19/2014. Minute Order of 06/20/2014 (Judge Black): Mr. Renge requests additional time to determine if there are any other properties. Minute Order of 03/07/2014(Judge Hamlin): Counsel to prepare an order indicating that the administrator has the authority to transfer property. Order is to be sent to Department 73 for Judge Hamlin's review and signature. As of this Examiner's review there has been nothing filed. 1. Need Inventory and Appraisal and First Account or Petition for Final Distribution or current written status report pursuant to Local Rule 7.5
Objections Video Receipt CI Report 9202 Order	The primary reason to keep the estate open is to provide continuing administrative authority to the Administrator to transfer property, if any, required by third party (ies) pursuant to court order.	must be filed no later than 10 days before the hearing. Status Reports must comply with the applicable code requirements. Notice of the status hearing, together with a copy of the Status Report shall be served
Aff. Posting Status Rpt UCCJEA Citation		on all necessary parties. Reviewed by: LV Reviewed on: 10/28/2014 Updates: Recommendation:
FTB Notice		File 4 - Renge

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Atty Kruthers, Heather H., of County Counsel (for Petitioner Public Administrator)

First and Final Account and Report of Administrator and Petition for Allowance of Ordinary and Extraordinary Commissions and Fees and For Distribution

DOD: 7/7/2011			PUBLIC ADMINISTRATOR, Administrator with Will Annexed, is Petitioner.	NEEDS/PROBLEMS/ COMMENTS:
Co	ont. from 09151	4	Account period: 7/3/2012 - 5/20/2014Accounting-\$241,666.61Beginning POH-\$220,000.00Ending POH-\$ 28,461.02 (all cash)	<u>Continued from</u> <u>9/15/2014</u> .
√ √	Verified Inventory		Administrator - \$7,633.34 (statutory)	
√ √ √	PTC Not.Cred. Notice of		Administrator XO - \$2,248.00 (per Local Rule 7.18(B)(1) for sale of two parcels of real property; and for 1 Deputy hour @ \$96 per hour and 2 assistant hours @ \$76 per hour for preparation and filing of	
√ √	Aff.Mail Aff.Pub.	W /	fiduciary tax returns;) Attorney - \$7,633.34 (statutory)	
	Sp.Ntc. Pers.Serv. Conf.		Costs - \$471.50 (filing fee, probate referee, publication, certified copies)	
	Screen Letters 0516 Duties/Supp	12	Bond fee - \$604.17 (OK) Distribution pursuant to Decedent's Will is to:	
	Objections Video		GAGE ANTHONY CERVELLI – \$9,870.67 cash.	
✓ ✓	Receipt CI Report 9202 Order		 Petitioner prays for an Order: Approving, allowing and settling the First and Final Account and confirming and approving all acts of the Petitioner as Administrator; Authorizing payment of the Administrator and Attorney fees and commissions; 	
	Aff. Posting Status Rpt UCCJEA Citation FTB Notice		3. Since the whereabouts of GAGE ANTHONY CERVELLI are not known, authorizing Petitioner to deposit any remaining balance of funds with the Fresno County Treasury pursuant to Probate Code § 11850(a).	Reviewed by: LEG Reviewed on: 10/28/14 Updates: Recommendation: File 6 - Cervelli

Krbechek, Randolf (for Dale George Mell – Executor)

Status Hearing Re: Filing of the First Account and/or Petition for Final Distribution

DC	D: 05/29/2009	DALE GEORGE MELL, son, was appointed	NEEDS/PROBLEMS/COMMENTS:
	-	Executor with full IAEA authority with bond	
		set at \$85,000.00 on 10/19/2013.	Minute Order of 09/16/2014: The Court
			issues Order to Show Cause with
	ont. from 041814,	Letters issued 01/14/2013.	Sanctions of \$800 to Dale G. Mell for
	0614, 080514,	Inventory 8 Approinal filed 02/09/2012 shows	failure to perform duties. Counsel will
	1614	Inventory & Appraisal filed 03/08/2013 shows an estate valued at \$235,148.00 consisting of	notify Bond Company of Issues.
	Aff.Sub.Wit.	real property.	Minute Order of 08/05/2014: Attorney
	Verified		Krbecheck is not present on today's
	Inventory	Minute Order of 10/19/2013 set this matter for	date. The Court will continue the matter
	PTC	hearing.	to continue the matter to accommodate his appearance.
	Not.Cred.	Former Status Report filed 06/02/2014 the	nis appearance.
	Notice of	most recent hearing on this matter was on	Minute Order of 04/18/2014: The Court
	Hrg	04/18/2014. Attorney informed the Court, he	notes that the bond has been posted
	Aff.Mail	has a solid working draft of the petition for	and the minute order of 10/19/2012
	Aff.Pub.	final distribution. Bank records necessary to	shows Dale G. Mell as the executor. Dale
	Sp.Ntc.	complete the petition were subpoended on 04/28/2014. The subpoend requested	G. Mell is ordered to be personally present on 06/06/2014 if the required
	Pers.Serv.	production of the bank records by	documents have not been filed.
	Conf.	05/23/2014. The bank has communicated	
	Screen	that they are assembling the documents	Copy of Minute Order mailed to Dale G.
	Letters	and should be able to produce them on or	Mell on 04/18/2014.
	Duties/Supp	about 06/06/2014. With this information the schedules on the petition for final distribution	Need First Account or Petition for Final
	Objections	= can be completed. Based on the forgoing	Distribution or current written status
	Video	a 30 day continuance of the Status Hearing	report pursuant to Local Rule 7.5
	Receipt	is requested in order to complete and file the	which states in all matters set for
-	CI Report	petition for final distribution.	status hearing verified status reports
	9202	Declaration of Randolf Krbechek filed	must be filed no later than 10 days
	Order	08/05/2014 states he cannot attend the	before the hearing. Status Reports
		hearing set for 08/05/2014 because he is	must comply with the applicable
		required to be in Redwood City at the same	code requirements. Notice of the
		time for the final Pre-Trial conference in a	•
		pending superior court action. The trial in	status hearing, together with a copy
		San Mateo case is set to commence on	of the Status Report shall be served
		08/11/2014. Based thereon, it is respectfully	on all necessary parties.
	Aff. Posting	requested that the court continue the	Reviewed by: LV
	Status Rpt	hearing on this matter to its next available date.	Reviewed on: 10/29/2014
	UCCJEA		Updates:
	Citation	<u>Please see additional page</u>	Recommendation:
	FTB Notice		File 7A – Mell
			7A

7A (additional page) Wilfred Carl Mell (Estate) Case No. 12CEPR00225

Declaration of Randolf Krbechek Regarding Case Management Conference and Request for Continuance filed 09/15/2014 states he has known the executor, Dale Mell, for many years as a fellow professional. Mr. Mell is a licensed surveyor, each have worked together on numerous matters. He has also testified as an expert witness in cases that Attorney Krbechek has tried. For reasons that cannot be fully understood each is experiencing inordinate difficulty in closing the estate. Attorney Krbechek requests the Court's assistance in addressing this matter.

Krbechek, Randolf (for Dale George Mell – Executor)

Order to Show Cause

DOD: 05/29/2009		DALE GEORGE MELL, son, was appointed	NEEDS/PROBLEMS/COMMENTS:
		Executor with full IAEA authority with bond	
		set at \$85,000.00 on 10/19/2013.	Need payment in the amount of
			\$800.00 for sanctions imposed on
		Minute Order of 09/16/2014: The Court issues	Dale G. Mell, Executor.
	and for any	Order to Show Cause with Sanctions of \$800	Notes that Mark the sales and Green
	ont. from	to Dale G. Mell for failure to perform duties.	Note: H.M. Vreeland and Son
	Aff.Sub.Wit.	Counsel will notify Bond Company of Issues.	(Bonding Company) was served by mail on 09/17/2014.
	Verified	Notice of Order to Show Cause was mailed	maii 011 07/17/2014.
	Inventory	to Dale G. Mell on 09/19/2014.	
	PTC	, ,	
	Not.Cred.		
✓	Notice of		
	Hrg		
✓	Aff.Mail		
	Aff.Pub.		
	Sp.Ntc.		
	Pers.Serv.		
	Conf.		
	Screen		
	Letters		
	Duties/Supp		
	Objections		
	Video		
	Receipt		
	CI Report		
	9202		
	Order		
	Aff. Posting		Reviewed by: L∨
	Status Rpt		Reviewed on: 10/29/2014
	UCCJEA		Updates:
	Citation		Recommendation:
	FTB Notice		File 7B - Mell
			7B

8

Atty Jaech, Jeffrey A., of Baker Manock & Jensen (for Petitioner Marilyn Z. Cunha, Guardian)

(1) First Account and Report of Guardian, (2) Petition for Allowance of Attorneys' Fees and (3) for Order Dispensing With Further Accountings Until the Guardianship is Terminated

Age: 12 years		MARILYN Z. CUNHA, paternal grandmother NEEDS/PROBLEMS/COMMENTS:
		and Guardian of the Person appointed on 4/19/2012, and Guardian of the Estate appointed on 6/24/2013, is Petitioner. Pages 9 and 10 are related matters.
Со	ont. from 100714	Account period: 6/24/2013 – 6/9/2014 Note: If Court grants Petitioner's
	Aff.Sub.Wit.	Accounting - \$43,486.47 request to dispense with
✓	Verified	Beginning POH - \$43,483.19 accountings until termination of
1	Inventory	Ending POH - \$36,119.97 the Guardianship, Court will set a (all cash) Status Hearing as follows:
Ľ	· ·	• Thursday, November 19, 2020
	PTC	Guardian - waives at 9:00 a.m. in Dept. 303 for
	Not.Cred.	the filing of the final account
✓	Notice of Hrg	Attorney - \$3,419.00 of the Guardianship.
_	Aff.Mail W/	(per Declaration of Jeffrey A. Jaech filed 8/28/2014 and itemization at Exhibit A; for Pursuant Local Rule 7.5, if the
√	0	= 36.60 hours @ attorney rate of \$395.00 and document noted above is filed 10
	Aff.Pub.	paralegal rate of \$150.00; total \$6,838.00 days prior to the date listed, the
	Sp.Ntc.	allocated ½ from each minor;) hearing will be taken off calendar
	Pers.Serv.	and no appearance will be
	Conf.	Costs - \$746.25 required.
	Screen	(filing fees, certified copies, copies of records, process service; total \$1,492.50
	Letters	= allocated ½ from each minor;)
	Duties/Supp	=
	Objections	Petitioner states all funds of the
	Video	guardianship estate are held in a blocked
	Receipt	account, and the annual income for this
	CI Report	accounting period was \$3.28; because of the costs and attorneys' fees required for
✓	2620(c)	the preparation and filing of accountings,
1	Order	Petitioner submits it is wasteful and
	Aff. Posting	imprudent to account to the court bi-
	Status Rpt	annually. Reviewed by: 226 Reviewed on: 10/28/14
	UCCJEA	Petitioner requests that all future bi-annual Updates:
	Citation	accountings be dispensed with, and that Recommendation:
	FTB Notice	Petitioner need only file a final accounting File 8 - Cunha
		at the termination of the Guardianship,
		pursuant to Local Rule 7.8.2.

9 Hope Destiny Cunha (GUARD/E)

Case No. 13CEPR00411

Atty Jaech, Jeffrey A., of Baker Manock & Jensen (for Petitioner Marilyn Z. Cunha, Guardian)

(1) First Account and Report of Guardian, (2) Petition for Allowance of Attorneys' Fees and (3) for Order Dispensing With Further Accountings Until the Guardianship is Terminated

Age: 10 years		MARILYN Z. CUNHA, paternal	NEEDS/PROBLEMS/COMMENTS:
		grandmother and Guardian of the Person	Pages 8 and 10 are related matters.
		appointed on 4/19/2012, and Guardian of	_
		the Estate appointed on 6/24/2013, is	Note: If Court grants Petitioner's
Co	ont. from 100714	Petitioner.	request to dispense with
	Aff.Sub.Wit.	Account period: 6/24/2013 - 6/9/2014	accountings until termination of the Guardianship, Court will set a Status
1	Verified	Accounting - \$43,486.47	Hearing as follows:
Ě	Inventory	Beginning POH - \$43,483.19	
✓	Inventory	Ending POH - \$36,119.97	Thursday, August 25, 2022 at
	PTC	(all cash)	9:00 a.m. in Dept. 303 for the
	Not.Cred.	Guardian - waives	filing of the final account of the
✓	Notice of		Guardianship.
	Hrg	Attorney - \$3,419.00	Pursuant Local Rule 7.5, if the
✓	Aff.Mail W/	(per Declaration of Jeffrey A. Jaech filed	document noted above is filed 10
	Aff.Pub.	8/28/2014 and itemization at Exhibit A; for	days prior to the date listed, the hearing will be taken off calendar
	Sp.Ntc.	36.60 hours @ attorney rate of \$395.00 and paralegal rate of \$150.00; total \$6,838.00	
	Pers.Serv.	allocated ½ from each minor;)	and no appearance will be
	Conf.		required.
	Screen	Costs - \$746.25	
	Letters	(filing fees, certified copies, copies of	
	Duties/Supp	records, process service; total \$1,492.50	
	Objections	allocated ½ from each minor;)	
	Video	Petitioner states all funds of the	
	Receipt	guardianship estate are held in a blocked	
	CI Report	account, and the annual income for this	
1	2620(c)	accounting period was \$3.28; because of	
	Order	the costs and attorneys' fees required for	
<u> </u>		the preparation and filing of accountings, Petitioner submits it is wasteful and	
	Aff. Posting	imprudent to account to the court bi-	Reviewed by: LEG
-	Status Rpt	annually.	Reviewed on: 10/28/14
-	UCCJEA	<u> </u>	Updates:
	Citation	Petitioner requests that all future bi-annual	Recommendation:
	FTB Notice	accountings be dispensed with, and that	File 9 - Cunha
		Petitioner need only file a final accounting	
		at the termination of the Guardianship, pursuant to Local Rule 7.8.2.	
<u> </u>		polocarii 10 200ai 11010 7.0.2.	1

Atty Jaech, Jeffrey A.; Manock, Charles K.; of Baker Manock & Jensen (for Petitioner Juliana Cunha, mother)

(1) First Account and Report of Guardian, (2) Petition for Allowance of Attorneys' Fees and (3) for Order Dispensing With Further Accountings Until the Guardianship is Terminated

Aq	e: 9 years		JULIANA CUNHA, mother and Guardian		and Guardian	NEEDS/PROBLEMS/COMMENTS:
,		of the Estate appointed on 6/24/2013, is			, , , , , , , , , , , , , , , , , , , ,	
			Petitioner.			<u>Pages 8 and 9</u> are related matters.
			Account period: 6/24/2013 – 7/7/2014		3 - 7/7/2014	Note: If Court grants Petitioner's
Со	nt. from 100714	4	Accounting	-	\$43,594.91	request to dispense with accountings
	Aff.Sub.Wit.		Beginning POH	-	\$43,583.19	until termination of the Guardianship,
1	Verified		Ending POH	-	\$43,594.91	Court will set a Status Hearing as
	Inventory				(all cash)	follows:
✓	Inventory		Guardian	_	waives	• Thursday, February 9, 2023 at 9:00
	PTC		Coaraian		waives	a.m. in Dept. 303 for the filing of
	Not.Cred.		Attorney	-	\$4,608.50	the final account of the
✓	Notice of		(per Declaration of	,		Guardianship.
	Hrg	14//	filed 8/28/2014 and			
✓	Aff.Mail	W/ O	Exhibit A; for establi guardianship estate			Pursuant Local Rule 7.5, if the document noted above is filed 10
	Aff.Pub.		deposit, first accou			days prior to the date listed, the
	Sp.Ntc.		attorney rate of \$39			hearing will be taken off calendar
	Pers.Serv.		rate of \$150.00;)			and no appearance will be required.
	Conf.		Casta		5007.00	
	Screen		Costs (filing fees, certified	- I conie:	\$896.00	
	Letters		ining rees, cermica	COPIC.	3, /	
	Duties/Supp		Petitioner states all	funds o	of the	
	Objections		guardianship estate			
	Video		blocked account, o			
	Receipt		income for this acc \$11.72; because of			
	CI Report		attorneys' fees requ			
✓	2620(c)		preparation and fili			
√	Order		Petitioner submits it	is wast	eful and	
	Aff. Posting		imprudent to acco	unt to t	he court bi-	Reviewed by: LEG
	Status Rpt		annually.			Reviewed on: 10/28/14
	UCCJEA		Petitioner requests t	that all	future bi-	Updates:
	Citation		annual accounting	s be di	spensed with,	Recommendation:
	FTB Notice		and that Petitioner		,	File 10 - Cunha
			accounting at the t			
			Guardianship, pursu 7.8.2.	Jani 10	LOCAI KUIE	
			/ ·U·L·			

11A Atty

David J. St. Louis (9764)
Roberts, David A. (for Joan St. Louis – Petitioner)
Cram, Donald H., III (for Bianca Soria – Limited Opposition)
Status Hearing Attý

DOD: 10-7-12	JOAN ST. LOUIS, Spouse, filed Petition for Assumption of	NEEDS/PROBLEMS/
DOD. 10-7-12	Law Practice of David St. Louis on 9-6-13.	COMMENTS:
	- Law 11 dolled of Bavia of, 2003 off 7 0 10.	
	Background: Mrs. St. Louis' petition requested:	Note: Page B is the status
Cont. from 111313,	1) That the Court assume jurisdiction over the law	hearing for filing of the accounting.
112013, 010814,	practice of David J. St. Louis and appoint attorney	accouning.
022614, 052814,	PAUL T. CHAMBERS to represent and assist the	
062514, 092214	Court in assuming jurisdiction;	
Aff.Sub.Wit.	2) Allow Mr. Chambers to appoint himself as receiver	
Verified	and take possession and control of any and all	
Inventory	bank accounts related to Mr. St. Louis' law practice, including the attorney-client trust	
PTC	account which contained \$54,502.09 at 3-31-13;	
Not.Cred.	3) Coordinate with Allison St. Louis, former legal	
Notice of Hrg	secretary, to determine the clients entitled to funds	
Aff.Mail	and the amounts each is owed;	
Aff.Pub.	4) Upon determining the recipients and the amounts	
	owed, that Mr. Chambers be allowed to issue	
Sp.Ntc.	checks to the recipients without further court order;	
Pers.Serv.	5) Specifically, that Mr. Chambers be allowed,	
Conf. Screen Letters	without further Court order, to issue checks from a certain estate account (John K. Shirin Estate) to	
	those recipients entitled thereto; and	
Duties/Supp	6) Upon completion, provided accounting.	
Objections	e e e e e e e e e e e e e e e e e e e	
Video Receipt	Non-Opposition to Petition was filed 9-30-13 by the	
CI Report	State Bar of California.	
9202	=	
Order	A Creditor's Claim and Request for Special Notice was	
Aff. Posting	filed 9-30-13 by Attorney J. Patrick Sullivan, who	Reviewed by: skc
	represents Walter Wentz, Creditor.	Reviewed by: 3Re
Status Rpt UCCJEA	Limited Opposition to Petition was filed 10-9-13 by	Updates:
Citation	BIANCA SORIA. Ms. Soria states she was a client of Mr.	Recommendation:
FTB Notice	St. Louis, who was wired \$65,000.00 in connection with	File 11A – St. Louis
	a settlement. Ms. Soria requested that as a condition	THE TTA SI. 20013
	to granting the petition, that the Court direct Mr.	
	Chambers to distribute the funds to her, or to post	
	appropriate bond.	
	At hearing on 10-16-13, the Court granted the petition	
	with additional orders and set this status hearing.	
	See Page 2 for specifics.	
	Subsequent to the hearing, both attorneys David	
	Roberts and Donald Cram submitted competing	
	proposed orders.	
	The section of the Country of the Co	
	Therefore, the Court was to address the competing	
	proposed orders at this status hearing on 11-13-13.	
	SEE ADDITIONAL PAGES	
		11 /

Page 2

Minute Order 10-16-13: Mr. Cram is appearing via CourtCall on behalf of Bianca Soria. The Court accepts Mr. Roberts representation that Attorney Timothy Magill has been given notice. The Court finds that Patrick James' client has been properly served. The Court will allow the interlination under 9764. The Court grants the petition and waives bond. The Court orders that the \$41,155. 89 be paid within 30 days. The Court notes that there are no funds to pay Attorney Chambers and he is acting in pro bono. Matter set for Status Hearing on 11/13/13. If everything is completed by 11/13/13, no appearances will be necessary. Set on 11/13/13 at 9am in Dept 303 for Status Hearing. Additional hearing dates 3/6/14 at 9am Dept 303 for Status Re Accounting; Petition is granted; Order to be signed ex parte.

Attorney David A. Roberts submitted a proposed Order that contains orders as follows:

- 1. Granting the petition that the Court assume jurisdiction over the law practice, including, but not limited to, dispersing [sic] funds held in the attorney-client trust account;
- 2. Appointing Paul T. Chambers to represent and assist the Court in assuming jurisdiction over the law practice without bond and shall receive no compensation;
- 3. That Mr. Chambers coordinate with Allison St. Louis to determine the clients entitled to files, documentation, and/or funds and the amounts each is owed;
- 4. That the amount that Mr. Chambers finds due to Ms. Soria shall be paid within 30 days from the entry of this order without further Court order;
- 5. That Mr. Chambers be allowed to appoint himself receiver and take possession of the various accounts and have signature power over such accounts, including that certain account fbo John K. Shirin or his heirs;
- 6. That after determining the recipients of the files, documents, and money, and the amount thereof, that Mr. Chambers is given the authority to disburse such without further Court order;
- 7. That Mr. Chambers is authorized without further Court order to issue checks from the John K. Shirin account to those recipients entitled thereto;
- 8. That upon completing the foregoing tasks, Mr. Chambers provide an accounting, upon approval of which he shall be discharged; and
- 9. That Mr. Chambers inform the Court of any other action taken as the Court's representative;
- 10. Setting hearing for approval of the final account on 3-6-14.

Attorney Donald H. Cram submitted an <u>Alternate</u> proposed Order that includes, in addition to the above orders, that Mr. Chambers shall disburse no less than \$41,155.89 to Ms. Soria within 30 days without further Court order.

<u>Note</u>: Per Minute Order 2-26-14, bond of \$47,000.00 was required. Bond was filed 3-17-14. No further status report or accounting has been filed.

<u>Note</u>: The Court had originally set status hearing for 3-6-14 for the filing of the accounting. On 3-6-14, that status hearing was continued with this status hearing. See Page B.

<u>Note</u>: The Order for Court Assumption of the Law Practice of David J. St. Louis, Deceased, and Appointing Paul T. Chambers Practice Administrator with Related Powers of Administration was signed on 3-26-14. <u>An Amended Order</u> was signed by the Court 5-14-14, which included specific distribution relative to the Shirin Estate.

Note: The amended order was apparently submitted to the Court for signature ex parte without petition. \$60.00 is due for the amended order.

Roberts, David A. (for Joan St. Louis) Atty Atty

Chambers, Paul T. (Practice Administrator)

Status Hearing Re: Filing of Accounting of the Practice Administrator

		DAVID J. ST. LOUIS, an attorney, passed	NEEDS/PROBLEMS/COMMENTS:
		away 10-7-12.	Continued from 3-6-14, 3-26-14,
		On 10-16-13, pursuant to the petition of	<u>5-28-14, 6-25-14, 9-22-14</u>
		JOAN ST. LOUIS, Attorney PAUL T. CHAMBERS	
	nt. from 030614,	was appointed as Practice Administrator	Note: First Account of IOLTA Trust Funds by Court Appointed Practice
	2614, 052814,	pursuant to Probate Code §9764 without	Administrator and Status Report was
U6.	2514, 092214 Aff.Sub.Wit.	bond.	filed 10-30-14 and set for hearing on
	Verified	At the hearing on 10-16-13, the Court set this	12-16-14. (This matter was not taken off calendar administratively
		status hearing for the filing of a final	because it was continued by the
	Inventory	accounting by the Practice Administrator	Court.)
	PTC Not Cred	pursuant to Probate Code §9764(h).	
-	Notice of		
	Hrg		
	Aff.Mail		
	Aff.Pub.		
	Sp.Ntc.		
	Pers.Serv.		
	Conf.		
	Screen		
	Letters		
	Duties/Supp		
	Objections		
	Video		
	Receipt		
	CI Report		
	9202		
	Order		Positions of learning
	Aff. Posting		Reviewed by: skc Reviewed on: 10-28-14
	Status Rpt UCCJEA		Updates:
	Citation		Recommendation:
	FTB Notice		File 11B – St. Louis
			110

Carlie Jezzel DeLa Fuente (GUARD/PE)

Van Doren, Cynthia M. (for Guardian Stephanee Woodward)

Probate Status Hearing RE: Receipt for Blocked Account

	T	
	STEPHANEE WOODWARD, Cousin, was	NEEDS/PROBLEMS/COMMENTS:
	appointed as Guardian of the Person	Continued from 0.20.14
	and Estate pursuant to Order entered 8-28-14 with all fund to be blocked.	Continued from 9-30-14
	6-26-14 WIIII dii lund to be blocked.	Minute Order 9-30-14: Counsel will
Cont. from 093014	Separately on 8-28-14, the Court set this	file documents regarding issues on
Aff.Sub.Wit.	status hearing for the filing of the	Examiner Notes.
Verified	receipt for blocked account and sent	
Inventory	notice to Attorney Van Doren.	As of 10-28-14, nothing further has
PTC		been filed. The following issue
Not.Cred.	=	<u>remains</u> :
	-	
Notice of Hrg		1. Need receipt for blocked
	4	account (MC-356) or verified status report pursuant to Local
Aff.Mail	4	Rule 7.5.
Aff.Pub.		Kole 7.6.
Sp.Ntc.		Note: Guardianship of the estate
Pers.Serv.		was requested in order to obtain
Conf.		any insurance or pension funds
Screen		due the minor; however, at the
Letters		time of appointment, the nature
Duties/Supp		and amounts expected were
Objections		unclear. The Court may require
Video	1	clarification regarding actions taken to determine whether the
Receipt		minor is entitled to lump sums or
CI Report	1	monthly payments, and if so,
9202	1	need Order to Deposit Money Into
Order	1	Blocked Account (MC-355).
		Note: The Court also set a status
		date of <u>1-13-15</u> for the filing of the
		Inventory and Appraisal.
100 5 10		
Aff. Posting	 	Reviewed by: skc
Status Rpt	-	Reviewed on: 10-28-14
UCCJEA	-	Updates:
Citation	-	Recommendation:
FTB Notice		File 12 - Fuente
		12

Warson, Starr (for Roy Borunda – Petitioner – Brother)

Amended Petition for Letters of Administration; Authorization to Administer Under IAEA (Prob. C. 8002, 10450)

DC	D: 07/26/2013	ROY BORUNDA, brother is petitioner and	NEEDS/PROBLEMS/COMMENTS:
		requests appointment as Administrator	
		without bond.	Need Affidavit of Publication.
		1	
<u> </u>	ont. from	All heirs waive bond – See Note	Note: The Original Petition filed
	Aff.Sub.Wit.		08/25/2014 requested bond set at
		Full IAEA - ?	\$250,000.00. Attached to that petition were waivers of bond from
✓	Verified	Decedent died intestate	each of the heirs. It is unclear if those
	Inventory	Becederii died ii iiesiaie	waivers of bond are still applicable to
	PTC	Residence: Caruthers	this petition since they were
	Not.Cred.	Publication: Need	attached to the original petition
	Notice of	1	where bond had been requested.
*	Hrg	Estimated value of the Estate:	The Court may require additional
✓	Aff.Mail	Personal property - \$159,000.00	waivers of bond.
	Aff.Pub. X	Probate Referee: Rick Smith	Note: If the petition is granted status
	Sp.Ntc.		hearings will be set as follows:
	Pers.Serv.		• Monday, 03/02/2015 at
	Conf.]	9:00a.m. in Dept. 303 for the filing
	Screen		of the inventory and appraisal
✓	Letters		<u>and</u>
✓	Duties/Supp		• Monday, 01/04/2016 at
	Objections		9:00a.m. in Dept. 303 for the filing
	Video]	of the first account and final
	Receipt		distribution.
	CI Report		Pursuant to Local Rule 7.5 if the required
	9202		documents are filed 10 days prior to the
✓	Order		hearings on the matter the status hearing
			will come off calendar and no appearance will be required.
	Aff. Posting	4	Reviewed by: LV
	Status Rpt	4	Reviewed by: 10/29/2014
	UCCJEA	1	Updates:
	Citation	1	Recommendation:
	FTB Notice	1	File 13B – Borunda
			12

Rodriguez, Frankie (for Primavera Damme – Daughter – Petitioner)

Petition for Letters of Administration; Authorization to Administer Under IAEA (Prob. C. 8002, 10450)

DO	D: 8-1-13		PRIMAVERA DAMME, Daughter, is	NEEDS/PROBLEMS/COMMENTS:
			Petitioner and requests appointment as Administrator with Full IAEA with bond of \$175,000.00.	CONTINUED TO 12-3-14 Per attorney request
~	Aff.Sub.Wit. Verified Inventory		Petitioner is a resident of Mesa, AZ. Full IAEA – need publication Decedent died intestate	 Need Duties and Liabilities of Personal Representative (DE-147) and Confidential Supplement (DE-147S) Need Notice of Petition to Administer
	Not.Cred. Notice of	Х	Residence: Fresno Publication: need publication	Estate (DE-121) 3. Need proof of service of Notice of
	Aff.Mail Aff.Pub.	X	Estimated value of estate: Personal property: \$ 5,000.00 Real property: \$ 170,000.00	Petition to Administer Estate at least 15 days prior to the hearing pursuant to Probate Code §8110 on all parties
	Sp.Ntc. Pers.Serv. Conf.		Total: \$175,000.00 Probate Referee: Rick Smith	listed at #8 of the petition: - Javier F. Sanchez (son) - Daniel Adan Sanchez (son)
	Screen Letters Duties/Supp	X		4. Need publication pursuant to Probate Code §8120.
	Objections Video Receipt			5. Need Order.6. Need Letters.
	CI Report 9202 Order	X		
	Aff. Posting Status Rpt UCCJEA			Reviewed by: skc Reviewed on: 10-28-14 Updates:
	Citation FTB Notice			Recommendation: File 14 – Valencia

14

Patricia Craig (CONS/PE)

Kruthers, Heather H. (for Fresno County Public Guardian – Petitioner)

Rindlisbacher, Curtis D. (Court-appointed for Proposed Conservatee Patricia Craig)

Petition for Appointment of Probate Conservator of the Person and Estate (Prob. C. 1820, 1821, 2680-2682)

_	1820, 1821, 2080-2082)				
			TEMPORARY CONSERVATORSHIP OF THE	NEEDS/PROBLEMS/COMMENTS:	
			The FRESNO COUNTY PUBLIC GUARDIAN is	Court Investigator advised rights on 10-10-14.	
	Lago Lago	ı	Petitioner and requests appointment as Conservator of the Person with medical	Voting rights affected - Need minute order	
	Aff.Sub.Wit.		consent powers under Probate Code §2355 and dementia placement powers under		
>	Verified		Probate Code §2356.5.	Note: The temporary conservatorship order authorized	
	Inventory		1100010 0000 32000.0.	Petitioner to change the residence	
	PTC		Voting rights affected	of the proposed Conservatee and	
	Not.Cred.			also authorized medical consent	
~	Notice of		A Capacity Declaration was filed 9-19-14.	powers pursuant to the Capacity Declaration.	
	Hrg		Estimated Value of Estate:	200.41011	
~	Aff.Mail		Personal property: \$ 10,500.00	1. The Court may require	
	Aff.Pub.		Annual income (pensions): \$ 48,000.00	clarification regarding the request to sell the proposed	
	Sp.Ntc.		Public Assistance (SSA): \$ 8,400.00	conservatee's former residence	
>	Pers.Serv.	W	Real property: \$125,000.00	with reference to Probate Code	
	Conf.		Date:	§2540. Has the proposed sale	
	Screen		Petitioner states the proposed Conservatee was residing in her own home with her son	been discussed with Ms. Craig?	
>	Letters		until very recently. In August, she was found	Note: If the petition is granted,	
	Duties/Supp		wandering, confused and agitated, in her	status hearings will be set as follows:	
	Objections		complex, and was taken to the hospital. Her	• Monday, April 6, 2015 at 9:00	
	Video		son, Alan, was also taken to the hospital. Ms.	a.m. in Department 303, for the	
	Receipt		Craig is unable to care for herself or take her	filing of the inventory and	
~	CI Report		medication on her own. Ms. Craig is also	appraisal.	
	9202		unable to manage her assets. Her son Alan was helping her pay bills, but was paying his	• Monday, April 4, 2016 at 9:00	
~	Order		bills with her money as well. Alan is also	a.m. in Department 303, for the	
			unable to care for Ms. Craig due to his own	filing of the first account current.	
			medical issues.	Pursuant to Local Rule 7.5 if the	
			.	required documents are filed 10	
			Petitioner also requests authority to sell Ms.	days prior the date set the status	
			Craig's house and personal property no longer needed by her. The Public Guardian is	hearing will come off calendar and	
			researching options for her to be able to live	no appearance will be required.	
			at home, but if it is determined that Alan also		
	Aff. Posting		requires placement in a facility, having the	Reviewed by: skc	
	Status Rpt		authority to sell granted at this time would	Reviewed on: 10-28-14	
	UCCJEA		benefit the proposed conservatee's estate.	Updates:	
~	Citation		Court Investigator Samantha D. Henson filed a	Recommendation:	
	FTB Notice		report on 10-24-14.	File 15 – Craig	
L					
-				15	

Standard, Donna M. (for Terry Novack – Named Executor – Petitioner)

Petition for Probate of Will and for Letters Testamentary; Authorization to
Administer Under IAEA (Prob. C. 8002, 10450)

D0	D: 9-21-14		TERRY NOVACE named		EDS/PROBLEMS/COMMENTS:
<u> </u>	D: 7-21-14		TERRY NOVACK, named Executor without bond, is	INE	ED3/FROBLEM3/COMMENTS.
			Petitioner.	1.	Documents are not properly tumbled
			remoner.		pursuant to Cal. Rules of Court, Rule 2.134.
			Full IAEA – need publication		Attorney is reminded to make sure
			Full IAEA – Need publication		documents filed in the future are properly
	Aff.Sub.Wit.	S/P	Will dated 6-9-14		tumbled.
		3/1	Will dated 6-7-14	١.	"
Ě	Verified		Residence: Squaw Valley, CA	2.	#5 of the Petition is incomplete at (a)(7)
	Inventory		Publication: need publication		and (a)(8). Was the decedent survived by issue of a predeceased child?
	PTC		1 oblication, fieed poblication		issue of a predeceased crima:
	Not.Cred.		Estimated value of estate:	3	#8 of the Petition does not provide the
~	Notice of		Personal property: \$20,000.00]	relationships to the decedent of the
1	Hrg		Annual income: "Unknown at		people listed.
~	Aff.Mail		this time, expectancy of		
	Aff.Pub.		daughter's estate"	4.	Need names and dates of deaths of the
		Х	9		decedent's spouse and daughter pursuant
	Sp.Ntc.		Probate Referee: Steven Diebert		to Local Rule 7.1.1.D. (Although the
	Pers.Serv.				decedent's will references dates of death, this information is required to be provided
	Conf.				and verified by the Petitioner.)
	Screen				and vermed by me remioner.)
	Letters	Х		5.	Petitioner appears to have stricken the
>	Duties/Supp				listing of the decedent's grandson, James
	Objections				Bandy at #8 of the Petition, and he was not
	Video				given notice of this petition. Although James Bandy is specifically excluded as
	Receipt				an heir pursuant to the decedent's will,
	CI Report				because he is specifically mentioned in
	9202				the will, he may be entitled to notice of this
_	Order				proceeding. See Probate Code §8110 and
	Oldel				Cal. Rules of Court, Rule 7.51(d) re notice
1					to a minor, if applicable.
					SEE PAGE 2
	Aff. Posting			Re	viewed by: skc
	Status Rpt			Re	viewed on: 10-28-14
	UCCJEA				dates:
	Citation			<u> </u>	commendation:
	FTB Notice				e 16 – Bandy
		1			14

Page 2

NEEDS/PROBLEMS/COMMENTS (Continued):

- 6. Pursuant to Cal. Rules of Court, Rule 7.51(e), notice may be required to the personal representatives of the estates of the post-deceased heirs, or their heirs. The Court may require additional information regarding whether estates have been established for the decedent's spouse and daughter, and may require additional information and notice to their heirs of this proceeding.
- 7. Notice to Lilarose Bangs was sent "C/O" Bright Horizons. However, direct notice is required pursuant to Cal. Rules of Court, Rule 7.51(a).
- 8. Need publication pursuant to Probate Code §8120.
- 9. Need Letters.

Note: If the petition is granted, status hearings will be set as follows:

- Monday, April 2, 2015 at 9:00 a.m. in Department 303, for the filing of the inventory and appraisal.
- **Monday, April 4, 2016** at 9:00 a.m. in Department 303, for the filing of the first account or petition for final distribution.

Pursuant to Local Rule 7.5 if the required documents are filed 10 days prior the date set the status hearing will come off calendar and no appearance will be required.

Jaech, Jeffrey A. (for Jennifer A. Williamson – sister/Petitioner)

Petition for Probate of Will and for Letters Testamentary; Authorization to Administer Under IAEA (Prob. C. 8002, 10450)

DOD: 09/22/	11	JENNIFER WILLIAMSON, sister/named	NEEDS/PROBLEMS/COMMENTS:
DOD. 07/22/	14	Executor without bond, is Petitioner.	NEEDS/TROBLEMS/COMMENTS.
		Executor will look boria, is relinorier.	1. It appears from the Petition that
		Full IAEA – OK	Petitioner is seeking to admit
		FUILIAEA - OK	only the 1996 Will to probate;
Cont. from		Will data d 05/02/0/	however a later dated (2007) holographic instrument has also
Aff.Sub.V	Vit.	Will dated 05/03/96	been deposited with the court.
✓ Verified		Residence: Fresno	The Court may require authority
Inventory	у	Publication: The Business Journal	to admit a prior will when a
PTC		1 oblication. The bosiness southai	more recently dated
Not.Cred	<u>.</u>	Estimated Value of the Estate:	testamentary instrument also exists.
✓ Notice o		Personal property - \$1,500,000.00	2. If the 2007 holographic
Hrg		Annual income - 100,000.00	instrument is to be admitted to
✓ Aff.Mail	w/o	Real property - 130,000.00	probate, will need Proof of
✓ Aff.Pub.		Total - \$1,730,000.00	Holographic Instrument (form DE-135) and a typed copy of
Sp.Ntc.		¥ 1,7. 00,000	the document pursuant to
Pers.Serv	,	Probate Referee: RICK SMITH	Probate Code § 8002.
Conf.	/•	Tracara Rafaras, Richa Chi	3. The Petition requests that
Screen			Jennifer Williamson be appointed as Executor without
✓ Letters			bond as she is nominated as
Leners			such in the 1996 will, however,
Dolles/30			due to the questions regarding
Objectio	ns		the 2007 holographic
Video			document, it is unclear whether her appointment as executor is
Receipt			appropriate. The Court may
CI Repor	rt		require authority.
9202			4. It would be helpful to the court
✓ Order			to know the dates of marriage and divorce of Decedent and
			Patricia Borrelli.
Aff. Posti	na		Reviewed by: JF
Status Rp			Reviewed by: 3F Reviewed on: 10/28/14
UCCJEA			Updates:
Citation			Recommendation:
FTB Notice	· <u>e</u>		File 18 – Williamson
_ TID ROIL	, c		18

Richtel, Melvin M. (for Crystal A. Nunes – daughter/Petitioner)

Petition for Probate of Will and for Letters Testamentary; Authorization to Administer Under IAEA (Prob. C. 8002, 10450)

DC	D: 04/30/14		CRYSTAL A. NUNES, daughter/named Executor	NEEDS/PROBLEMS/COMMENTS:
			without bond, is Petitioner.	
Со	ont. from		Full IAEA – OK	
✓ ✓	Aff.Sub.Wit.		Will dated 09/12/13	
	Inventory		Residence: Fresno	
	PTC Not.Cred.		Publication: The Business Journal	
✓	Notice of Hrg		Estimated Value of the Estate: Personal property - \$82,000.00	
√	Aff.Mail	w/o	Real property - 122,000.00	
<u> </u>	Aff.Pub. Sp.Ntc.	<u> </u>	Total - \$204,000.00	
	Pers.Serv.		Probate Referee: RICK SMITH	
	Conf. Screen			
✓	Letters			
✓	Duties/Supp			
	Objections			
	Video Receipt			
	CI Report			
√	9202 Order			
Ė	Aff. Posting	-		Reviewed by: JF
	Status Rpt			Reviewed on: 10/29/14
	UCCJEA			Updates:
	Citation			Recommendation: SUBMITTED
	FTB Notice			File 19 – Phelps

Milnes, Michael A (for Richard Moniz and Helen Moniz – Executors)

Probate Status Hearing Re: Failure to File the Inventory and Appraisal and for Failure to File a First Account or Petition for Final Distribution

MONIZ, were appointed Executors with full IAEA authority without bond on 09/30/2002. Cont. from 020714, 032814, 053014, 070714, 081814, 100614 Inventory and Appraisal was due 02/23/2004. Verified Inventory First Account or Petition for Final Distribution was due on 11/2004. Notice of Notice of Notice of Aff. Pub. Sp.Ntc. Pers. Serv. Conf. Screen Letters Duties/Supp Objections Video Receipt CI Report Order Aff. Posting Aff. Po			RICHARD MONIZ and HELEN	NEEDS/PROBLEMS/COMMENTS:
032814, 053014, 070714, 081814, 100614 10061			MONIZ, were appointed Executors with full IAEA authority without bond on	Minute Order of 10/06/2014 (Judge Cardoza): Counsel reports that a petition for final distribution has been
Inventory	032 070	2814, 053014, 0714, 081814, 0614 Aff.Sub.Wit.	Inventory and Appraisal was	Richard and Helen Moniz and will provide the clerk's office with the address. OSC issued to Richard and Helen to personally appear on 10/06/2014 to explain why they
Notice of Hrg Notice of Status Hearing was mailed to Michael Milnes, Aff.Mail Aff.Pub. Aff.Mail Aff.Pub. Sp.Ntc. Pers.Serv. Conf. Screen Letters Duties/Supp Objections Video Receipt CI Report 9202 Order Aff. Posting Aff. Posting Minute Order of 07/07/2014: No appearances. The Court sets the matter for an Order to Show Cause on 07/07/2014 regarding failure to appear. The Court orders Michael Milnes to be personally present on 07/07/2014. Copy of Minute Order mailed to Michael Milnes on 05/30/2014. Minute Order of 02/07/2014: No appearances. Mr. Milnes is directed to contact his clients regarding this matter. Copy of Minute Order mailed to Michael Milnes on 03/06/2014. 1. Need Final Inventory and Appraisal and First Account or Petition for Final Distribution or current written status report pursuant to Local Rule 7.5 which states in all matters set for status hearing verified status reports must be filed no later than 10 days before the hearing. Status Reports must comply with the applicable code requirements. Notice of the status hearing, together with a copy of the Status Report shall be served on all necessary parties. Reviewed by: LV		Inventory	Final Distribution was due on	
Aff. Mail Aff. Pub. Sp. Ntc. Pers. Serv. Conf. Screen Letters Duties/Supp Objections Video Receipt CI Report 9202 Order Aff. Posting Af		Notice of	Notice of Status Hearing was	·
Pers.Serv. Copy of Minute Order mailed to Michael Milnes on 05/30/2014. Minute Order of 02/07/2014: No appearances. Mr. Milnes is directed to contact his clients regarding this matter. Objections Video Receipt CI Report P202 Order Order Aff. Posting Copy of Minute Order mailed to Michael Milnes on 03/06/2014. Need Final Inventory and Appraisal and First Account or Petition for Final Distribution or current written status report pursuant to Local Rule 7.5 which states in all matters set for status hearing verified status reports must be filed no later than 10 days before the hearing. Status Reports must comply with the applicable code requirements. Notice of the status hearing, together with a copy of the Status Report shall be served on all necessary parties. Reviewed by: LV		Aff.Mail Aff.Pub.	Attorney, Richard Moniz, and	07/07/2014 regarding failure to appear. The Court orders
Screen Letters Minute Order of 02/07/2014: No appearances. Mr. Milnes is directed to contact his clients regarding this matter. Objections Video Receipt CI Report Petition for Final Distribution or current written status report pursuant to Local Rule 7.5 which states in all matters set for status hearing verified status reports must be filed no later than 10 days before the hearing. Status Reports must comply with the applicable code requirements. Notice of the status hearing, together with a copy of the Status Report shall be served on all necessary parties. Aff. Posting Reviewed by: LV		Pers.Serv.	=	Copy of Minute Order mailed to Michael Milnes on
Objections		Screen Letters		Minute Order of 02/07/2014: No appearances. Mr.
CI Report 1. Need Final Inventory and Appraisal and First Account or Petition for Final Distribution or current written status report pursuant to Local Rule 7.5 which states in all matters set for status hearing verified status reports must be filed no later than 10 days before the hearing. Status Reports must comply with the applicable code requirements. Notice of the status hearing, together with a copy of the Status Report shall be served on all necessary parties. Aff. Posting Reviewed by: LV		Objections	_	Copy of Minute Order mailed to Michael Milnes on
Petition for Final Distribution or current written status report pursuant to Local Rule 7.5 which states in all matters set for status hearing verified status reports must be filed no later than 10 days before the hearing. Status Reports must comply with the applicable code requirements. Notice of the status hearing, together with a copy of the Status Report shall be served on all necessary parties. Aff. Posting Reviewed by: LV		Receipt		Need Final Inventory and Appraisal and First Account or
		9202		pursuant to Local Rule 7.5 which states in all matters set for status hearing verified status reports must be filed no later than 10 days before the hearing. Status Reports must comply with the applicable code requirements. Notice of the status hearing, together with a copy of the Status
		Aff. Posting		
		Status Rpt		Reviewed on: 10/28/2014
UCCJEA Updates:			_	
Citation Recommendation:			_	
FTB Notice File 20 - Gracie		FTB Notice		HIE 20 - Gracie

Standard, Donna M (for Petitioners)

Status Hearing for Failure to Have Letters Issue

NOVAK, friend (Caregiver), were appointed as Co-Conservators of the Person and Estate with independent powers under Probate Code § 2590, without bond. Aff. Sub. Wit. Verified Inventory PTC Notice of Hrg Aff. Mail Aff. Pub. Sp. Ntc. Pers. Serv. Conf. Screen Letters Duties/Supp Objections Video Receipt CI Report Aff. Posting Status Rpt UCCJEA Citation FTB Notice NOVAK, friend (Caregiver), were appointed as Co-Conservators of the Person and Estate with independent powers under Probate Code § 2590, without bond. Hand Downs and Estate with independent powers under Probate Code § 2590, without bond. Letters have not issued. Notice of Status Hearing was filed 09/03/2014. Notice of Hrg Aff. Pub. Sp. Ntc. Pers. Serv. Conf. Screen Letters Duties/Supp Objections Video Receipt CI Report Py202 Order Aff. Posting Status Rpt UCCJEA Citation FTB Notice NoVAK, friend (Caregiver), were appointed as Co-Conservators of the Person and Estate with independent powers that Ms. Bandy passed away before letters could be issued. Counsel is ordered to submit written status report. 1. Need Letters to issue or current written status report pursuant to Local Rule 7.5 which states in all matters set for status reports must be filed no later than 10 days before the hearing. Status Reports must comply with the applicable code requirements. Notice of the status hearing, together with a copy of the Status Report shall be served on all necessary parties. Reviewed by: LV Reviewed on: 10/29/2014 Updates: Recommendation: File 21 - Bandy			WAYNE L. BANDY, spouse, ARTHUR OSTRANDER, friend (CPA), and TERRY	NEEDS/PROBLEMS/COMMENTS:
Cont. from 100815 Aff. Sub. Wift. Verified Inventory Notice of Status Hearing was filed 09/03/2014. Notice of Status Hearing was filed 09/03/2014. Notice of Status Hearing was filed 09/03/2014. Notice of Hrg Aff. Mail Aff. Pub. Sp. Ntc. Pers. Serv. Conf. Screen Letters Duties/Supp Objections Video Receipt CI Report 9202 Order Aff. Posting Status Rpt UCCJEA Citation Citation Comments Counter the province of the status report pursuant to Local Rule 7.5 which states in all matters set for status hearing verified status reports must be filed no later than 10 days before the hearing. Status Reports must comply with the applicable code requirements. Notice of the status hearing, together with a copy of the Status Report shall be served on all necessary parties. Reviewed by: LV Reviewed on: 10/29/2014 Updates: Recommendation: Recommendation:			NOVAK, friend (Caregiver), were appointed as Co-Conservators of the Person and Estate with independent	Cardoza): Counsel reports that Ms.
Verified Inventory Inventory PTC Notice of Status Hearing was filed 09/03/2014. Notice of Status Hearing written status report pursuant to Local Rule 7.5 which states in all matters set for status hearing verified status reports must be filed no later than 10 days before the hearing. Status Reports must comply with the applicable code requirements. Notice of the status hearing, together with a copy of the Status Report shall be served on all necessary parties. Status Report shall be served on all necessary parties. Reviewed by: LV Reviewed on: 10/29/2014 Updates: Recommendation: Recomme	Cont.	from 100815	without bond.	
Notice of Status Hearing was filed	A	ff.Sub.Wit.	1	to submit written status report.
Inverted	V	erified	Leffers have not issued.	
Not.Cred. Notice of Hrg Aff.Mail Aff.Pub. Sp.Ntc. Pers.Serv. Conf. Screen Letters Duties/Supp Objections Video Receipt CI Report 9202 Order Aff. Posting Status Rpt UCCJEA Citation Local Rule 7.5 which states in all matters set for status hearing verified status reports must be filed no later than 10 days before the hearing. Status Reports must comply with the applicable code requirements. Notice of the status hearing, together with a copy of the Status Report shall be served on all necessary parties. Reviewed by: LV Reviewed on: 10/29/2014 Updates: Recommendation:	In	ventory		
Notice of Hrg Notice of Hrg Aff.Mail Aff.Pub. Sp.Ntc. Pers.Serv. Conf. Screen Letters Duties/Supp Objections Video Receipt CI Report 9202 Order Aff. Posting Status Rep Status Negrorts must be filed no later than 10 days before the hearing. Status Reports must comply with the applicable code requirements. Notice of the status hearing, together with a copy of the Status Report shall be served on all necessary parties. Reviewed by: LV Reviewed on: 10/29/2014 UCCJEA Citation Matters set for status hearing verified status reports must filed no later than 10 days before the hearing. Status Report shall be served or all necessary parties. Reviewed by: LV Reviewed on: 10/29/2014 Updates: Recommendation:	P1	TC	09/03/2014.	- · ·
Notice of Hrg Aff.Mail Aff.Pub. Sp.Ntc. Pers.Serv. Conf. Screen Letters Dutles/Supp Objections Video Receipt CI Report 9202 Order Aff. Posting Status Rpt Reviewed by: LV Reviewed on: 10/29/2014 UCCJEA Citation Verified status reports must be filed no later than 10 days before the hearing. Status Reports must comply with the applicable code requirements. Notice of the status hearing, together with a copy of the Status Report shall be served on all necessary parties.	N	ot.Cred.		
Hrg Aff.Mail Aff.Pub. Sp.Ntc. Pers.Serv. Conf. Screen Letters Duties/Supp Objections Video Receipt CI Report 7202 Order Aff. Posting Status Rpt UCCJEA Citation filed no later than 10 days before the hearing. Status Reports must comply with the applicable code requirements. Notice of the status hearing, together with a copy of the Status Report shall be served on all necessary parties. Reviewed by: LV Reviewed on: 10/29/2014 Updates: Recommendation:	N	otice of		=
Aff.Pub. Sp.Ntc. Pers.Serv. Conf. Screen Letters Duties/Supp Objections Video Receipt CI Report 9202 Order Aff. Posting Status Rpt UCCJEA Citation Comply with the applicable code requirements. Notice of the status hearing, together with a copy of the Status Report shall be served on all necessary parties. Reviewed by: LV Reviewed by: LV Reviewed on: 10/29/2014 Updates: Recommendation:	H	rg		· ·
Sp.Ntc. Pers.Serv. Conf. Screen Letters Duties/Supp Objections Video Receipt CI Report 9202 Order Aff. Posting Status Rpt UCCJEA Citation requirements. Notice of the status hearing, together with a copy of the Status Report shall be served on all necessary parties. Reviewed by: LV Reviewed by: LV Reviewed on: 10/29/2014 Updates: Recommendation:	A	ff.Mail		,
Sp.Nrc. hearing, together with a copy of the Status Report shall be served on all necessary parties.	A	.ff.Pub.		. , , , , , , , , , , , , , , , , , , ,
Pers.Serv. Conf. Screen Letters Duties/Supp Objections Video Receipt CI Report 9202 Order Aff. Posting Status Rpt UCCJEA Citation the Status Report shall be served on all necessary parties. Reviewed by: LV Reviewed by: LV Reviewed on: 10/29/2014 Updates: Recommendation:	Sp	p.Ntc.		· ·
Conf. Screen Letters Duties/Supp Objections Video Receipt CI Report 9202 Order Aff. Posting Status Rpt UCCJEA UCCJEA Citation On all necessary parties. Reviewed by: LV Reviewed by: LV Reviewed on: 10/29/2014 Updates: Recommendation:	Pe	ers.Serv.		
Screen Letters Duties/Supp Objections Video Receipt CI Report 9202 Order Aff. Posting Status Rpt UCCJEA Citation Reviewed on: 10/29/2014 Updates: Recommendation:	С	onf.		· ·
Duties/Supp Objections Video Receipt CI Report 9202 Order Aff. Posting Status Rpt UCCJEA UCCJEA Citation Duties/Supp Reviewed by: LV Reviewed on: 10/29/2014 Updates: Recommendation:	Sc	creen		, '
Objections Video Receipt CI Report 9202 Order Aff. Posting Status Rpt UCCJEA UCCJEA Citation CI Report Reviewed by: LV Reviewed on: 10/29/2014 Updates: Recommendation:	Le	etters		
Video Receipt CI Report 9202 Order Aff. Posting Status Rpt UCCJEA Uideo Reviewed by: LV Reviewed on: 10/29/2014 Updates: Citation Recommendation:	D	uties/Supp		
Receipt CI Report 9202 Order Aff. Posting Status Rpt UCCJEA Citation Reviewed by: LV Reviewed on: 10/29/2014 Updates: Recommendation:	0	bjections		
CI Report 9202 Order Aff. Posting Status Rpt UCCJEA Uiccidation Reviewed by: LV Reviewed on: 10/29/2014 Updates: Recommendation:	V	ideo		
9202 Order Reviewed by: LV Reviewed on: 10/29/2014 UCCJEA Updates: Recommendation:	Re	eceipt		
Order Aff. Posting Reviewed by: LV Reviewed on: 10/29/2014 UCCJEA Updates: Citation Recommendation:	С	I Report		
Aff. Posting Status Rpt UCCJEA Citation Reviewed by: LV Reviewed on: 10/29/2014 Updates: Recommendation:	92	202		
Status Rpt UCCJEA Updates: Citation Recommendation:				
UCCJEA Updates: Citation Recommendation:				
Citation Recommendation:	l			Reviewed on: 10/29/2014
				·
FTB Notice File 21 - Bandy	l 			
	FT	TB Notice		File 21 - Bandy

Atty Vang, Manila (Pro Per – Sister – Petitioner)

Petition for Appointment of Probate Conservator of the Person (Prob. C. 1820)

Ī		AAANII A VANC Cistor is Detition or grad	
		MANILA VANG, Sister, is Petitioner and	NEEDS/PROBLEMS/COMMENTS:
		requests appointment as Probate Conservator of the Person with medical	Court Investigator advised riable
			Court Investigator advised rights on 8-26-14.
		consent powers.	On 8-26-14.
Con	nt. from 091114	Voting rights <u>not</u> affected	Continued from 9-11-14
	Aff.Sub.Wit.	gg	<u> </u>
~	Verified	A Capacity Declaration was filed 10-29-14.	Minute Order 9-11-14: Petitioner
	Inventory		waiting on Capacity
=	PTC	Petitioner states her sister has had various medical issues since birth and at this time is	Declaration.
	Not.Cred.	also mentally ill.	Note: Capacity Declaration was
	Notice of		filed 10-29-14.
	Hrg	Court Investigator Dina Calvillo filed a report	
~	Aff.Mail	on 9-3-14.	
	Aff.Pub.		
	Sp.Ntc.		
~	Pers.Serv.		
~	Conf.		
	Screen		
~	Letters		
>	Duties/Supp		
	Objections		
~	Video		
	Receipt		
~	CI Report		
	9202		
~	Order		
	Aff. Posting		Reviewed by: skc
	Status Rpt		Reviewed on: 10-28-14
	UCCJEA		Updates: 10-29-14
>	Citation		Recommendation:
	FTB Notice		File 22 – Le Chang
			22

Phoutthavone, Souriya (Pro Per – Son – Petitioner)

Petition for Letters of Administration; Authorization to Administer Under IAEA (Prob. C. 8002, 10450)

			C. 8002, 10450)	
DO	D: 11-6-13		SOURIYA PHOUTTHAVONE, Son, is	NEEDS/PROBLEMS/COMMENTS:
			Petitioner and requests appointment as	Cankara d fram 0 00 14
			Administrator with Full IAEA without bond.	Continued from 9-29-14.
			Full IAEA – Need publication	Minute Order 9-29-14: The Court
Со	nt. from 092914	4		recommends Petitioner to seek
	Aff.Sub.Wit.		Decedent died intestate	legal advice. Examiner Notes
~	Verified			given.
	Inventory		Residence: Fresno	A = = \$ 10 00 14 m = \$ \text{in m fourth on h m = }
	PTC		Publication: Need publication	As of 10-28-14, nothing further has been filed.
	Not.Cred.		Estimated value of estate: \$0	Booti med.
	Notice of	Х		The following issues remain:
	Hrg		Probate Referee: Rick Smith	_
	Aff.Mail	Х		<u>See Page 2</u>
	Aff.Pub.	Х		
	Sp.Ntc.			
	Pers.Serv.			
	Conf.			
	Screen			
~	Letters			
~	Duties/Supp			
	Objections			
	Video			
	Receipt			
	CI Report			
	9202			
~	Order			
	Aff. Posting			Reviewed by: skc
	Status Rpt			Reviewed on: 10-28-14
	UCCJEA			Updates:
	Citation			Recommendation:
	FTB Notice			File 23 – Phoutthavone

Page 2

NEEDS/PROBLEMS/COMMENTS:

- 1. The petition is blank at #5.a.(3) and (4) and at #5.a.(7) and (8). Need verified declaration with this information. Was the decedent survived by a domestic partner or no domestic partner? Was the decedent survived by issue of a predeceased child or no issue of a predeceased child?
- 2. Petitioner lists one other relative at #8 Chaytha Phoutthavone but does not state this relative's relationship to the decedent.

<u>Note</u>: It appears from is person's age that he or she is a sibling of the petitioner. However, Petitioner states at #5.a. that the decedent was survived by a spouse. Need verified declaration containing a complete list of relatives who should be listed per #8.

- 3. Need Notice of Petition to Administer Estate (Form DE-121) and proof of service of Notice on all relatives at least 15 days prior to the hearing per Probate Code §8110.
- 4. Need publication pursuant to Probate Code §8120 and Local Rule 7.9.
- 5. Petitioner estimates the value of the estate at \$0. The Court may require clarification.
- 6. This petition was filed with a fee waiver. If estate assets are distributed in the future, Petitioner should be aware that the original Court filing fee will be due at that time.

<u>Note</u>: Petitioner may wish to seek legal advice from an attorney as to probate is a necessary or appropriate procedure to handle the decedent's estate. There may be other procedures available to Petitioner depending on the reason for probate. Remember that a document service or paralegal cannot give legal advice. Petitioner is encouraged to research the procedures at the Fresno County Law Library or consult with an attorney to decide how to proceed.

Monevilay, Junior (pro per – brother/Petitioner)

Petition for Appointment of Guardian of the Person (Prob. C. 1510)

		TEMPORAR EXPIRES 11/03/14	NEEDS/PROBLEMS/COMMENTS:
		JUNIOR MONEVILAY, brother, is Petitioner.	
Cont. from		Father: TROY KEOPHOUNSOUK –	
Aff.Sub.Wit.		personally served on 09/02/14	
✓ Verified		Mother: JULIA MONTEVILAY – deceased	
Inventory			
PTC		Paternal grandfather: TOMMY	
Not.Cred.		KEOPHOUNSOUK – Served by mail on 09/08/14	
✓ Notice of		Paternal grandmother: LAE	
Hrg		KEOPHOUNSOUK – Served by mail on	
✓ Aff.Mail	w/	09/08/14	
Aff.Pub.			
Sp.Ntc.		Maternal grandparents: DECEASED	
Pers.Serv.		Petitioner alleges that temporary	
✓ Conf. Screen		guardianship is necessary because their	
✓ Letters		mother recently died and their father has	
✓ Duties/Supp		threatened to take the children to live	
Objections		with him. Petitioner alleges that their father has not cared for the minors while	
Video		their mother was ill. Their parents	
Receipt		separated in 2013. Petitioner alleges that	
✓ CI Report		his mother told him before her death that	
9202		their father had a history of domestic	
✓ Order		violence and it is believed that he abuses	
Aff. Posting		meth. Petitioner states that their mother was the primary care provider for the	Reviewed by: JF
Status Rpt		children. Petitioner further states that the	Reviewed on: 10/29/14
✓ UCCJEA		children have a strong desire to remain	Updates:
Citation		with him.	Recommendation:
FTB Notice			File 24 – Monevilay
		Court Investigator Jennifer Daniel filed a	
		report on 10/22/14.	

Atty Fernandez, Jack Frank (Pro Per – maternal grandfather/Petitioner)

Atty Fernandez, Lydia P. (pro per – maternal grandmother/Petitioner)

Petition for Appointment of Guardian of the Person (Prob. C. 1510)

Ag	je: 3		NO TEMPORARY REQUESTED	NEEDS/PROBLEMS/COMMENTS:
Co	nt. from Aff.Sub.Wit. Verified Inventory PTC Not.Cred. Notice of Hrg Aff.Mail Aff.Pub. Sp.Ntc. Pers.Serv. Conf. Screen Letters Duties/Supp Objections Video Receipt	w/	JACK FERNANDEZ and LYDIA FERNANDEZ, maternal grandparents, are Petitioners. Father: AUSTIN MARKS, currently incarcerated, served by mail on 09/09/14 Mother: EMILY ROSE FERNANDEZ – personally served on 10/08/14 Paternal grandfather: MARIO DILLANES – Declaration of Due Diligence filed 10/09/14 Paternal grandmother: MONICA MARKS-REA – Consent & Waiver of Notice filed 10/09/14 Petitioners state that they have been Joseph's unofficial guardians since birth. They now need legal guardianship to take care of his medical needs and enroll him in school. His mother is using drugs and alcohol and neglects his health and dental care. The mother has also stated that she will not allow him to go to school, and has stated that she will home school him, which Petitioners believe will not happen. Petitioner further state that Joseph's father has never contributed to his support or wellbeing. Court Investigator Samantha Henson filed a	 Proof of service filed 10/09/14 indicates that Austin Marks (father) was served by mail at Wasco State Prison per the instructions of prison officials. The Court may require personal service as required pursuant to Probate Code § 1511. Declaration of Due Diligence filed 10/09/14 states that the paternal grandfather's whereabouts are unknown and he has not been seen or heard from for 22 years. If diligence is not found, need proof of service by mail at least 15 days before the hearing of Notice of Hearing with a copy of the Petition for Appointment of Guardian of Person or Consent & Waiver of Notice
√	Receipt CI Report		Court Investigator Samantha Henson filed a report on 10/24/14.	
	9202			Tot Matto Diliaties.
✓	Order			
	Aff. Posting			Reviewed by: JF
	Status Rpt			Reviewed on: 10/30/14
✓	UCCJEA			Updates:
	Citation			Recommendation:
	FTB Notice			File 25 – Fernandez
				25

25

Lopez, Santiago, Jr. (Pro Per – Petitioner)

Petition to Determine Succession to Real Property (Prob. C. 13151)

Relationship not stated 40 days since DOD				Petition to Determine Succession to Rea	l Property (Prob. C. 13151)
Aff. Sub. Wit. Aff. Sub. Wit. Verified Inventory Not. Cred. Notice of Hrg Aff. Pub. Sp. Ntc. Pers. Serv. Conf. Screen Letters Duties/Supp Objections Video Receipt CI Report P202 Order Aff. Posting Aff. Posting Status Rpt UCCJEA Citation Aff. Posting Status Rpt UCCJEA Citation I&A (blank) No other proceedings No other proceedings I&A ? (blank) I&A ? (blank) Decedent died intestate Petitioner requests ? (not stated) - Inventory and App Need I&A. See #8 of I&A Form DE-160. Petionact the Probate appraisal of the real - Attachment 11 doe decedent's interest i - #13 does not state by Petitioner in the re - Petitioner's identity the decedent is uncleacy ording to the pet Lopez, Jr.; however, 11 children of the de Santiago Lopez (with Santiago Lopez Ister the same person as Lopez, Jr.? - If so, it is unclear withat the real property him only, since all still equal priority to succorroperty. If the proceeding of them together, the Court together proceeding of the pet Santiago Copez (with Santiago Copez). The court together proceeding of the pet Santiago Copez (with Santiago Copez). If the proposed or Local Rule, 7.1.1.F. Reviewed by: ske Reviewed on: 10-29-14 Updates: Recommendation:	DO	D: 7-26-14			NEEDS/PROBLEMS/COMA
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FTB Notice File 26 - Lopez	_		1		
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MENTS:

- ition based on the Probate Code
 - #7 (proceedings in
 - raisal is blank. the petition and titioner should Referee for property.
 - es not state the in the real property.
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 - and relationship to lear. His name tition is Santiaao Attachment 14 lists ecedent, including hout "Jr."). Is the d in Attachment 14 Petitioner Santiago
 - hy Petitioner claims y should pass to blings have an ceed to the erty will pass to all ey must all petition oursuant to Probate lso Probate Code uccession in
 - der pursuant to

Atty Atty Chapman, Diana (Pro Per – Mother – Petitioner) Chapman, Robert (Pro Per – Father – Petitioner)

Petition for Appointment of Probate Conservator of the Person (Prob. C. 1820, 1821, 2680-2682)

			NO TEMP WAS REQUESTED	NEEDS/PROBLEMS/COMMENTS:	
			DIANA and ROBERT CHAPMAN , Parents, are Petitioners and request appointment as Co-Conservators of the Person with medical	Court Investigator advised rights on 10-9-14	
	Aff.Sub.Wit.		consent powers under Probate Code §2355. Voting rights affected	Voting rights affected - Need Minute order	
	Inventory PTC		A Capacity Declaration was filed 9-29-14.	Need video receipt pursuant to Local Rule 7.15.8.A.	
	Not.Cred.		Petitioners state the proposed Conservatee	The video and proof of viewing certificate are	
~	Notice of Hrg		Petitioners state the proposed Conservatee is diagnosed with severe developmental delay and mental retardation. She suffered	available online at the Fresno Superior Court	
~	Aff.Mail		a stroke in utero and her official diagnosis is	website (click on Probate,	
	Aff.Pub.		microcephaly, hemiplegia, seizure disorder,	then Conservatorship), or the video can be viewed at the	
	Sp.Ntc.		global developmental delay, and gerd. She is nonverbal, requires a feeding tube, is	Probate Clerk's office.	
>	Pers.Serv.		wheelchair bond, and is legally blind. She	Trobate Cierk's office.	
~	Conf.		requires 24 hour care and supervision and		
	Screen		has resided in a residential care facility since		
~	Letters		she was about a year old. She will continue		
~	Duties/Supp		to reside there after the conservatorship is granted. The proposed Conservatee		
	Objections		graduated from the Rata Special Needs		
	Video	Χ	Program in June of this year and now		
	Receipt		attends Rainmaker Adult Education Center.		
~	CI Report				
	9202		Court Investigator Jennifer Daniel filed a		
~	Order		report on 10-27-14.		
	Aff. Posting			Reviewed by: skc	
	Status Rpt			Reviewed on: 10-29-14	
	UCCJEA			Updates:	
 	Citation	<u> </u>		Recommendation:	
	FTB Notice			File 27 – Chapman	

Julio Novoa, Jr., and Carlos Novoa-Rodriguez

Case No. 14CEPR00969

Rodriguez, Javier (Pro Per – Maternal Grandfather – Petitioner) Rodriguez, Elvia (Pro Per – Maternal Grandmother – Petitioner)

Petition for Appointment of Temporary Guardianship/Conservatorship of the Person (Prob. C. 2250)

			GENERAL HEARING 1-5-15	NE	EEDS/PROBLEMS/COMMENTS:
			JAVIER and ELVIA RODRIGUEZ, Maternal Grandparents, are Petitioners.	1.	If notice to the father is not excused, need personal service of Notice of Hearing with a copy
	Aff.Sub.Wit.		Father: JULIO CESAR NOVOA		of the temporary guardianship petition at least five court days
>	Verified		Mother: ELVIA ELVIRA RODRIGUEZ - Deceased		prior to the hearing <u>or</u> consent and waiver of notice or
	Inventory		- Deceased		declaration of due diligence on:
	PTC Not.Cred.		Paternal Grandfather: Not listed		- Julio Cesar Novoa (Father)
	Notice of	Х	Paternal Grandmother: Not listed	2.	The paternal grandparents are
	Hrg Aff.Mail		Petitioners state the children's mother died in 2008 and their father is currently		not listed. Information regarding the paternal grandparents will be
	Aff.Pub.		residing in Mexico. The father is aware		required for the general hearing
	Sp.Ntc.		that he is not currently able to provide		on 1-5-15, and service will be
	Pers.Serv.	Х	for the children. The children are currently living with Petitioners and		required pursuant to Probate Code §1511, or consent and
~	Conf.		Petitioners are able to provide for all of		waiver of notice or declaration of
	Screen		their needs and the children are happy		due diligence.
>	Letters		and secure in their home.		
>	Duties/Supp		Petitioners state temporary		
	Objections Video		guardianship is needed for school and		
	Receipt		other programs that they are involved in related to their benefit.		
	CI Report		in related to their benefit.		
	Clearances		Petitioners request that the Court		
>	Order		excuse notice to the father because he		
	Aff. Posting		is residing in Mexico.		eviewed by: skc
.4	Status Rpt				eviewed on: 10-29-14
~	UCCJEA Citation				odates: ecommendation:
	FTB Notice				e 28 – Novia-Rodriguez
<u> </u>	115 HOIICE			1 111	20 - 140414-Rounguez

Stephanie Gonzalez, Robert C. Ripoyla, Jr., Case No. 14CEPR00972 Emmanuel M. Ripoyla, Noah J. Ripoyla, Isaiah E. Ripoyla, and Ezekiel J. Ripoyla (GUARD/P)

Atty Janisse, Ryan Michael (for Jesse Gonzalez and Jodi Schroeder – Petitioners)

Petition for Appointment of Temporary Guardian of the Person (Prob. C. 2250)

			TEMP GRANTED EX PARTE EXPIRES 11-3-14	NEEDS/PROBLEMS/		
			GENERAL HEARING 1-5-15	COMMENTS:		
			JESSE GONZALEZ, Maternal Grandfather, and JODI SCHROEDER, fiancée of Maternal Grandfather, are Petitioners.	Need Notice of Hearing. Need proof of personal service of Notice of		
	Aff Cub Wit		Father (Stephanie): UNKNOWN	Hearing with a copy of		
~	Aff.Sub.Wit. Verified		Father (Robert, Emmanuel, Noah, Isaiah, and Ezekiel): ROBERT RIPOYLA	the temporary guardianship petition at least five court days		
	Inventory		Mother: STEPHANIE RIPOYLA (Deceased)	prior to the hearing		
	PTC		Paternal Grandparents (Stephanie): Unknown	pursuant to Probate Code §2250(e) <u>or</u>		
	Notice of Hrg	Х	Paternal Grandfather (Robert, Emmanuel, Noah, Isaiah, and Ezekiel): Not listed	consent and waiver of notice <u>or</u> declaration of due diligence on:		
	Aff.Mail		Paternal Grandmother (Robert, Emmanuel, Noah,	- Unknown father of		
	Aff.Pub.		Isaiah, and Ezekiel): Irma Cisneros	Stephanie Gonzalez		
	Sp.Ntc.		Maternal Grandmother: Andrea A. Davalos	- Minors age 12 and older: Stephanie		
\	Pers.Serv.	Χ	Petitioners state the mother died in a car accident	Gonzalez, Robert C.		
	Conf. Screen		on 10-4-14. The father of five of the children was abusive in the home. Prior to the mother's death,	Ripoyla, Jr., and Emmanuel M. Ripoyla		
	Letters		the children were living with the mother in a motel.			
>	Duties/Supp		They were unable to attend school regularly. Petitioners need to be able to communicate with	3. If notice to Robert Ripoyla (father of five		
	Objections		the schools to ensure the children get back on track	youngest minors) is not		
	Video Receipt		with attendance and receive the tutoring help they need to get caught up.	excused, need personal service of Notice of		
	CI Report		Petitioners request the Court excuse notice to	Hearing with a copy of the temporary		
	9202		Robert Ripoyla, father of five of the children,	guardianship petition at		
	Order		because his address is unknown and he is violent and gang-affiliated. At this time, he is believed to be a threat of abducting the children. Petitioners state the children do not want to have contact with him. Points and authorities are provided re: good cause exists to dispense with notice to Mr. Ripoyla. The mother was involved in divorce proceedings	least five court days prior to the hearing <u>or</u> consent and waiver of notice <u>or</u> declaration of due diligence on: - Robert Ripoyla (Father)		
	Aff. Posting		against him and had a domestic violence restraining order to protect her and the children	Reviewed by: skc		
	Status Rpt		from his abuse.	Reviewed on: 10-29-14		
_	UCCJEA Citation		According to the UCCJEA, the children have been	Updates: Recommendation:		
	FTB Notice		with Petitioners since 10-5-14. Prior to that, they were with their mother in Fresno.	File 29 – Gonzalez &		
			wiiii iiieli filoifiei iii fiesiio.	Ripoyla		